A9055-1A 10/90

TV BASICS
1990-91

The Television Bureau of Advertising's report on the scope and dimensions of television today.

TVB TV BASICS

JAMES A. JOYELLA
President

A MESSAGE FROM THE PRESIDENT

If there is such a thing as a perennial favorite in the TVB reference library, then "TV BASICS" is it.

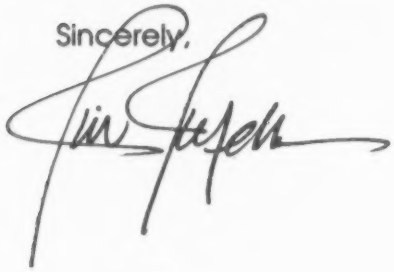
And with good reason.

This report combines the facts and figures upon which broadcast television's leadership position as the most superior advertising medium available is based.

Whether it be measured by reach and frequency criteria, delivery of target audiences, or its ability to enhance a message through the strength of its communications value, television offers to advertisers the greatest opportunity for producing assured sales results.

We hope you find TV BASICS a valuable resource.

Sincerely,



TV BASICS

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Cable households spend more time with over-the-air television than cable 4

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Television is the source of most news 5

Television is the most credible news source 5

Broadcast television provides better local and national news than cable 5

Television is authoritative, exciting and influential 5

Adults look forward to watching television every day 5

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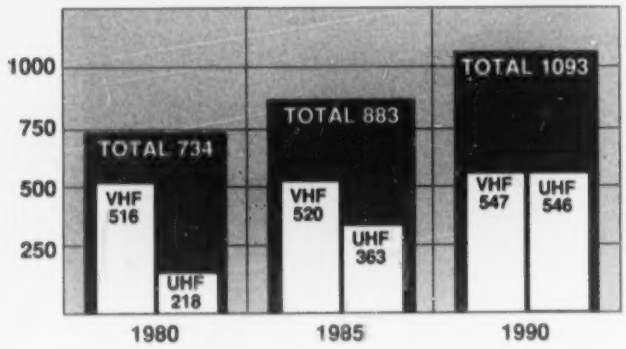
TV BASICS

TELEVISION: PERVASIVE AND GROWING

The number of commercial television stations continues to grow.

COMMERCIAL TELEVISION STATIONS

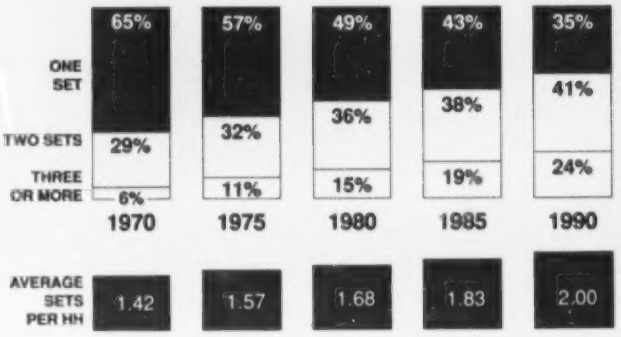
Source: Television Digest, Jan. of each year



65% of television households have two or more television sets.

SETS PER HOUSEHOLD (%)

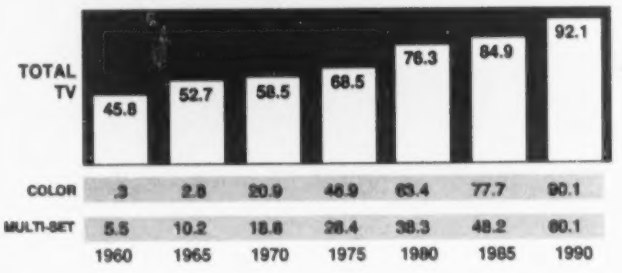
Source: A.C. Nielsen



Television reaches 98% of all households. In 1990 there were 92.1 million households with televisions.

MILLIONS OF HOUSEHOLDS WITH TELEVISION

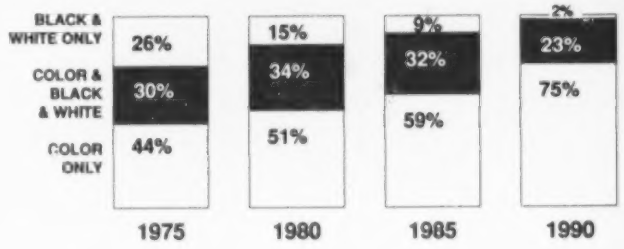
Source: NBC, A.C. Nielsen



98% of television households have color television sets.

TYPES OF TELEVISION SETS (%)

Source: A.C. Nielsen



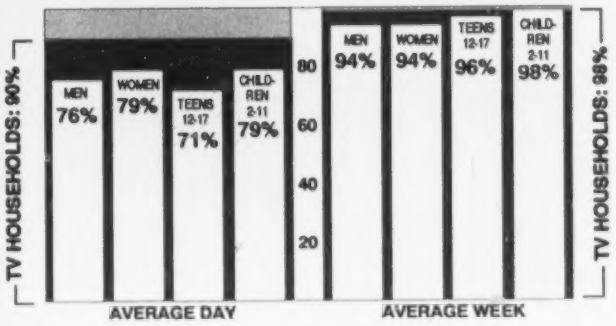
TV BASICS

TELEVISION REACHES PEOPLE

Television is everywhere! Television reaches many people every day and most people every week.

TELEVISION REACH (%)

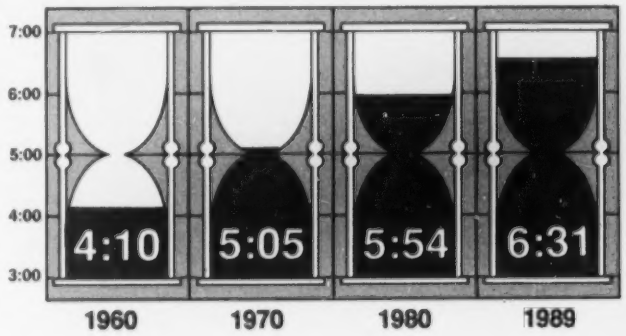
Source: A.C. Nielsen, Feb. 1989



Summertime viewing has continued to grow over the years. Summer viewing now tops 6-1/2 hours per day...

DAILY VIEWING PER TV HOME (HOURS: MINUTES)

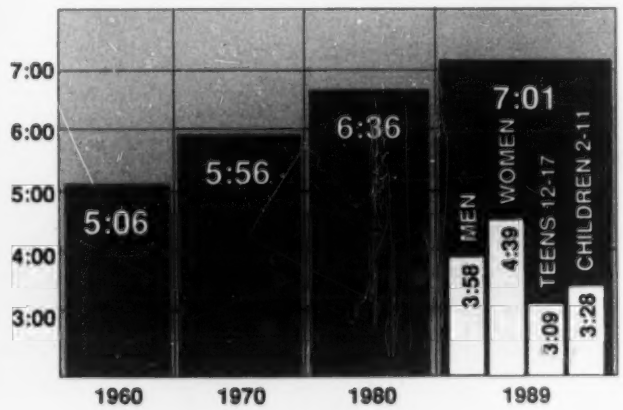
Source: A.C. Nielsen



Television viewing tops 7 hours per home per day.

DAILY VIEWING PER TV HOME (HOURS: MINUTES)

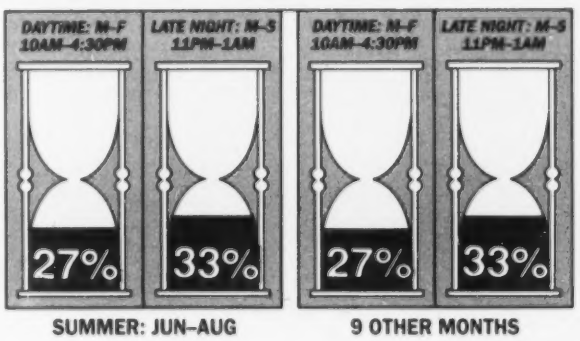
Source: A.C. Nielsen, annual averages



...and, in fact, summer viewing equals the other months in two major dayparts!

HOMES USING TV DURING AVERAGE MINUTE:'89

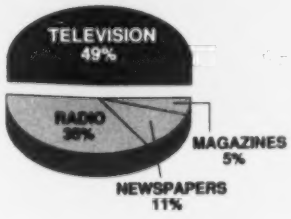
Source: A.C. Nielsen



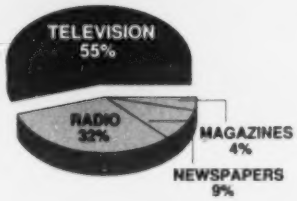
TV VS. OTHER MEDIA/ VCRs & CABLE

Adults spend more time with television than with all the other major media combined.

$50,000+ INCOME



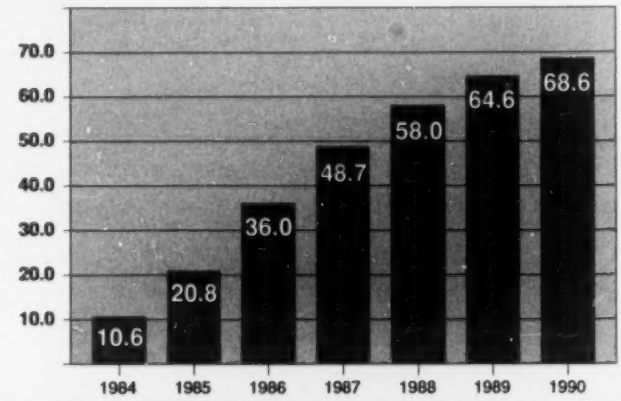
This holds true in high-income homes and for college-educated adults, as well.



Source: TVB/Bruskin Associates, 1990

There are VCRs in 68.6% of television households...

TELEVISION HOUSEHOLDS WITH VCRs (%) Source: A.C. Nielsen, (NSI) Feb. each year

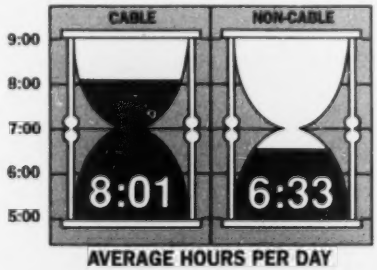


...and these households record over-the-air television far more than they record cable.

Source: VCR Tracking Report, Nov. 1989
Nielsen Television Index

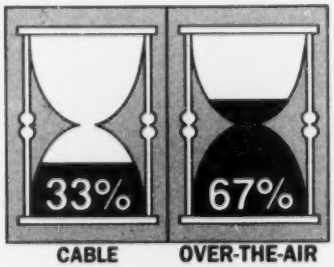
Households with cable spend more time with television than do non-cable households...

CABLE VS. NON-CABLE HOUSEHOLDS



...and also spend more time with over-the-air television than they do with cable.

CABLE VS. OVER-THE-AIR VIEWING (%)

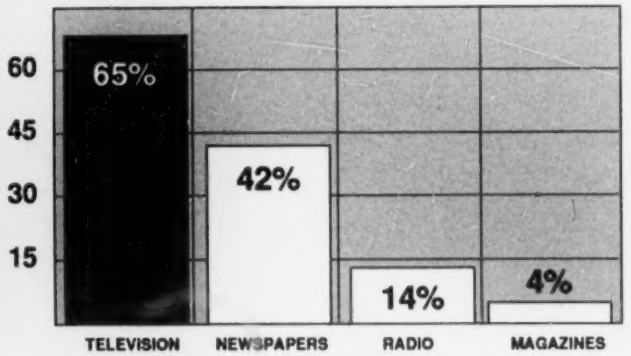


Source: A.C. Nielsen, Jan. 1990

Source: A.C. Nielsen, NTI Cable Status Report Jan. 1990

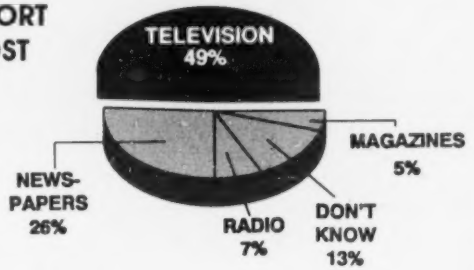
Television is perceived as being the source of most news as well as the most credible news source...

MEDIUM FOR SOURCE OF MOST NEWS



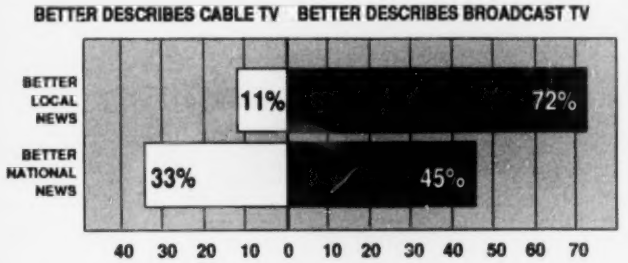
Source: TIO/Roper, 1988, percent of adults responding
Multiple responses permitted.

MEDIA REPORT THAT IS MOST CREDIBLE



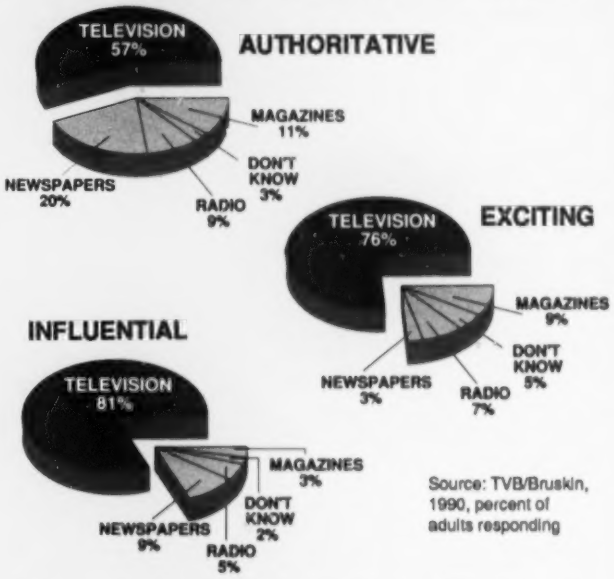
Source: TIO/Roper, 1988, percent of adults responding

...and broadcast television is seen as providing better local and national news than cable.



Source: TIO/Roper, 1988, percent of adults responding

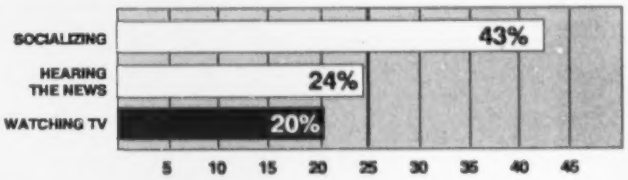
In addition, television advertising is the most authoritative, exciting and influential.



Source: TVB/Bruskin, 1990, percent of adults responding

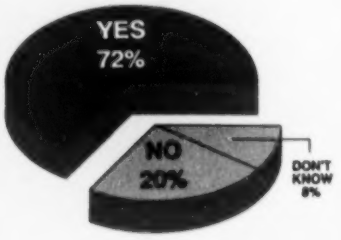
Thirty-six million adults say that watching television is something they most look forward to every day.

WHAT PEOPLE LOOK FORWARD TO DURING THE DAY



Source: TIO Roper, 1988, percent of adults responding

The public overwhelmingly agrees that commercials are a fair exchange for the privilege of watching free television.



Source: TIO/Roper, 1988

TVB TV BASICS

ADVERTISING ON TELEVISION

Television is the number-one national advertising medium.

NATIONAL AD VOLUME

Source: McCann-Erickson

MEDIUM	MILLIONS OF DOLLARS 1988	1989	% CHANGE	'89 % OF TOTAL
Television	$18,162	$18,949	+4.3	55.5
Network	9,172	9,110	-0.7	26.7
Spot	7,147	7,354	+2.9	21.5
National Syndication	901	1,288	+43.0	3.8
Cable	942	1,197	+27.1	3.5
Newspapers	3,586	3,720	+3.7	10.9
Magazines	6,072	6,716	+10.6	19.6
Radio (Network & Spot)	1,843	2,023	+9.8	5.9
Business Papers	2,610	2,763	+5.9	8.1
TOTAL MAJOR MEDIA	**$32,273**	**$34,171**	**+5.9**	**100.0**

LOCAL AD VOLUME

Source: McCann-Erickson

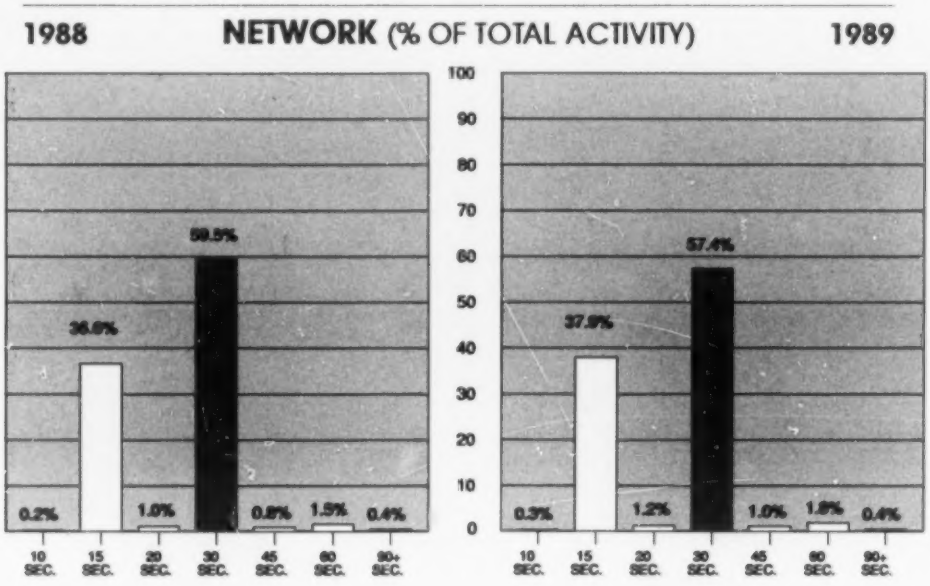
MEDIUM	MILLIONS OF DOLLARS 1988	1989	% CHANGE	'89 % OF TOTAL
Television	$7,524	$7,942	+5.6	18.5
Local	7,270	7,612	+4.7	17.7
Cable	254	330	+29.9	0.8
Newspapers	27,611	28,648	+3.8	66.8
Retail	15,840	16,606	+4.8	38.7
Classified	11,771	12,042	+2.3	28.1
Radio	5,955	6,300	+5.8	14.7
TOTAL MAJOR MEDIA	**$41,090**	**$42,890**	**+4.4**	**100.0**

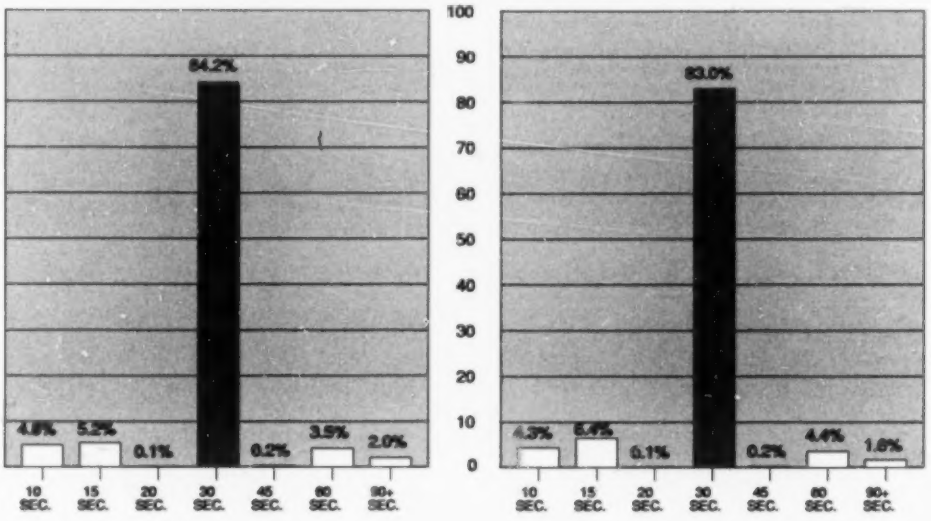
TOTAL AD VOLUME

Source: McCann-Erickson

MEDIUM	MILLIONS OF DOLLARS 1988	1989	% CHANGE	'89 % OF TOTAL
Television	$25,686	$26,891	+4.7	21.7
Newspapers	31,197	32,368	+3.8	26.1
Magazines	6,072	6,716	+10.6	5.4
Radio	7,798	8,323	+6.7	6.8
Business Papers	2,610	2,763	+5.9	2.2
All Others	44,687	46,869	+4.9	37.8
TOTAL ADVERTISING	**$118,050**	**$123,930**	**+5.0**	**100.0**

The 30-second commercial still dominates in 1989.





Source: Arbitron

TOP 40 LOCAL TELEVISION CATEGORIES • 1989

Source: Arbitron

CATEGORY	RANK	TV $ IN MILLIONS	% CHG OVER 1988
Amusements & Entertainment	11	143.9	+13
Appliance Stores & Repair	9	152.8	+10
Auto & Truck Dealer Sales	3	321.4	-15
Auto Repair & Service Stations	19	88.7	-4
Auto Supply & Accessory Stores	28	39.7	+5
Banks, Savings & Loan Assns.	7	197.3	+3
Beauty Shops & Supplies	36	25.7	+3
Builders & Home Improvement Contractors	33	27.2	+3
Business Services, Misc.	38	17.1	+47
Carpet & Floor Covering Stores	24	51.0	-1
Clothing Stores	12	143.6	+19
Dairy Stores	40	11.7	+8
Department Stores	5	213.1	+42
Discount Department Stores	15	117.1	+1
Drug Stores	17	93.9	+21
Education Services	14	131.9	+18
Financial Planning Services	37	24.4	-18
Food Stores & Supermarkets	2	341.2	+1
Furniture Stores	4	278.2	+17
Gas, Electric, & Water Companies	25	50.4	+10
Health Clubs & Reducing Salons	18	93.6	+51
Home Centers & Hardware Stores	16	106.3	+8
Hotels & Resorts, U.S.	20	82.4	+5
Insurance Agencies	39	17.0	-31
Jewelry & Metal Exchange Stores	35	25.7	+13
Legal Services	21	82.3	+29
Leisure Time Activities & Services, Misc.	13	134.5	+4
Loan & Mortgage Companies	32	30.4	+31
Medical & Dental Services	10	144.8	+11
Movies	6	210.8	+13
Newspapers	29	37.2	+10
Optical Services & Supplies	22	77.4	-3
Personal Services, Misc.	23	57.0	+17
Radio & TV Stations & Cable TV	8	182.8	+14
Realtors & Real Estate Developers	30	33.6	+10
Rental Services	31	31.0	-14
Restaurants & Drive-Ins	1	838.3	+4
Shoe Stores	27	44.0	+1
Shopping Centers & Assns.	34	26.0	+7
Sport, Hobby & Toy Stores	26	47.4	+1

TOP 40 LOCAL TELEVISION CATEGORIES • 1989 *% OF COMMERCIALS BY DAYPART*

CATEGORY	DAY M-F	EARLY EVE	NIGHT	LATE NIGHT	WKEND DAY
Amusements & Entertainment	35	22	10	19	14
Appliance Stores & Repair	28	28	12	23	9
Auto & Truck Dealer Sales	24	24	12	27	13
Auto Repair & Service Stations	14	28	15	27	16
Auto Supply & Accessory Stores	18	25	15	26	16
Banks, Savings & Loan Assns.	16	32	23	21	8
Beauty Shops & Supplies	29	20	10	25	16
Builders & Home Improvement Contractors	39	17	8	14	22
Business Services, Misc.	42	14	7	28	9
Carpet & Floor Covering Stores	43	20	8	19	10
Clothing Stores	29	30	12	20	9
Dairy Stores	38	28	12	14	8
Department Stores	35	30	14	17	4
Discount Department Stores	39	28	13	16	4
Drug Stores	34	31	12	18	5
Education Services	83	7	2	5	3
Financial Planning Services	41	21	8	18	12
Food Stores & Supermarkets	37	27	15	15	6
Furniture Stores	38	20	9	21	12
Gas, Electric, & Water Companies	23	29	18	19	11
Health Clubs & Reducing Salons	68	17	4	7	4
Home Centers & Hardware Stores	27	30	11	20	12
Hotels & Resorts, U.S.	27	26	14	22	11
Insurance Agencies	51	12	7	19	11
Jewelry & Metal Exchange Stores	38	19	10	21	12
Legal Services	79	6	3	8	4
Leisure Time Activities & Services, Misc.	35	26	11	17	11
Loan & Mortgage Companies	47	13	7	22	11
Medical & Dental Services	53	19	8	14	6
Movies	19	44	11	22	4
Newspapers	20	26	20	23	11
Optical Services & Supplies	33	28	11	18	10
Personal Services, Misc.	35	9	6	41	9
Radio & TV Stations & Cable TV	26	26	16	21	9
Realtors & Real Estate Developers	42	19	8	14	17
Rental Services	59	16	5	10	10
Restaurants & Drive-Ins	19	37	17	19	8
Shoe Stores	35	30	12	16	7
Shopping Centers & Assns.	48	23	7	15	7
Sport, Hobby & Toy Stores	33	24	10	18	15

% OF COMMERCIALS BY MONTH

Source: Arbitron

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
11.7	9.1	7.4	7.9	6.7	8.2	8.3	8.7	7.8	9.1	7.9	7.2
8.3	8.3	7.5	6.1	7.3	7.0	9.3	9.0	7.5	7.3	9.7	12.7
9.7	11.3	10.0	9.3	8.3	8.0	7.9	8.1	8.4	7.6	6.8	4.6
7.3	9.6	9.2	9.4	10.5	8.7	9.1	9.8	7.4	8.0	7.7	3.3
4.6	4.8	10.3	12.3	11.4	11.3	9.6	6.5	6.5	7.4	7.9	7.4
7.6	9.8	10.4	11.5	10.2	8.5	5.7	5.5	9.2	9.7	7.3	4.6
9.4	10.5	9.5	8.1	8.0	7.5	7.3	9.8	7.8	7.7	8.9	5.5
6.1	7.6	9.5	10.3	9.5	10.3	9.0	8.3	9.4	8.3	7.1	4.6
7.0	6.8	6.7	7.0	7.2	9.3	10.2	8.1	9.5	9.5	9.0	9.7
7.8	9.6	8.5	9.2	8.0	7.8	7.5	8.0	7.7	9.8	9.3	6.8
5.8	4.3	10.1	7.0	6.5	7.3	4.7	10.6	6.8	7.4	12.2	17.3
4.7	6.7	7.7	8.7	12.4	14.8	12.4	7.4	4.8	5.6	7.8	7.0
4.7	5.2	8.5	6.8	7.3	6.4	5.1	9.1	9.8	8.8	11.9	16.4
2.9	4.3	6.6	6.8	7.0	6.2	5.9	8.5	7.9	7.4	17.5	19.0
7.7	6.5	8.0	8.4	10.1	8.1	5.8	7.4	8.2	7.7	9.5	14.6
8.6	8.5	8.7	7.7	7.9	8.3	7.7	10.2	9.4	8.0	7.8	7.2
14.1	17.4	14.4	8.3	4.9	5.2	5.3	5.6	7.0	6.1	6.5	5.2
7.4	8.4	8.6	7.3	9.9	8.7	8.5	8.4	8.0	8.5	8.6	7.7
8.7	9.1	8.0	7.5	7.9	7.6	8.6	9.0	8.4	8.5	8.8	7.9
5.4	7.2	8.1	8.4	8.7	8.5	8.8	8.5	10.3	10.1	8.9	7.1
9.6	8.1	8.6	8.9	7.6	7.9	7.8	7.2	10.7	8.7	7.2	7.7
3.5	5.8	8.8	10.0	12.5	10.5	6.9	8.0	10.1	8.9	7.5	7.5
9.2	9.0	12.0	11.2	13.7	12.5	8.3	6.5	5.8	3.7	4.2	3.9
10.7	9.1	8.5	7.2	7.7	7.4	9.9	8.2	8.4	7.4	7.4	8.1
3.8	6.5	4.1	5.2	6.5	4.7	4.4	4.1	4.5	6.7	14.4	35.1
8.2	8.6	8.0	8.0	8.4	8.1	8.3	8.2	9.0	9.1	8.2	7.9
6.7	7.8	7.2	7.2	9.5	13.8	15.3	13.9	6.6	4.3	5.0	2.7
6.6	7.2	8.4	8.1	8.2	8.1	8.0	7.9	8.7	9.4	9.8	9.6
8.6	8.9	8.8	8.5	8.1	8.2	7.7	8.3	9.1	8.7	8.1	7.0
6.9	8.8	7.3	9.3	6.1	8.6	13.5	12.6	3.4	8.1	6.7	8.7
7.4	8.9	8.1	11.8	8.1	6.6	5.8	7.1	13.0	11.2	7.7	4.3
7.8	8.9	7.8	8.9	7.3	9.5	7.7	10.3	9.0	8.3	7.6	6.9
5.4	6.1	7.0	7.7	7.3	7.5	9.4	11.8	9.7	9.4	9.2	9.5
7.4	9.2	7.4	12.8	11.5	7.2	4.9	4.6	9.1	12.0	8.5	5.4
7.5	10.3	12.4	9.9	8.7	9.6	8.5	8.3	9.6	6.7	5.3	3.2
6.5	8.8	9.9	8.5	7.4	9.0	7.3	8.4	7.7	8.6	8.9	9.0
6.0	7.5	8.6	8.3	8.8	9.0	9.6	9.3	8.4	8.7	7.5	8.3
4.0	4.4	17.0	8.5	10.0	5.0	2.9	15.2	9.0	4.7	10.2	9.1
3.8	3.3	8.4	3.6	5.3	3.2	4.6	8.5	4.7	5.7	13.7	35.2
3.7	3.3	4.5	4.4	4.2	6.8	5.2	6.7	4.7	4.8	20.2	31.5

Color numerals indicate highest TV month

TOP 25 SPOT TELEVISION CATEGORIES • 1989

CATEGORY AND RANK	MILLIONS OF DOLLARS
1. Automotive	$1,415
2. Food & Food Products	958
3. Consumer Services	380
4. Confectionery & Soft Drinks	303
5. Toiletries & Toilet Goods	281
6. Travel, Hotels & Resorts Outside U.S.	215
7. Beer & Wine	208
8. Sporting Goods & Toys	193
9. Proprietary Medicines	167
10. Gasoline, Lubricants & Other Fuels	164
11. Household Equipment & Supplies	132
12. Publishing & Media	130
13. Soaps, Cleansers & Polishes	118
14. Home Electronics Equipment	116
15. Insurance	104
16. Apparel, Footwear & Accessories	94
17. Building Mat., Equip. & Fixtures	79
18. Jewelry, Optical Goods & Cameras	59
19. Horticulture	47
20. Household Furnishings	43
21. Pet Foods & Supplies	41
22. Freight & Industrial Development	36
23. Computers, Office Equip., Stationery	32
24. Religious, Political & Unions	18
25. Agriculture & Farming	17

Source: Arbitron

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